
Highlights: Q4, 2018

We are pleased to share Fletcher Spaght's Fourth Quarter Highlights, summarizing recent achievements within our specialized consulting practice groups. We appreciate your continued interest and support.

HIGH TECHNOLOGY PRACTICE

Manufacturing Automation Services

Developed support materials for a Private Equity fund seeking to exit its investment in a manufacturing automation systems integrator; conducted extensive secondary market research as well as primary market research with clients/potential clients and competitors of the portfolio company to characterize and evaluate growth drivers and market trends and their likely impact on the portfolio company; developed a competitive landscape, examined the company's performance relative to competitors and identified, and prioritized, requirements to compete successfully; FSI developed market models with growth scenarios to support potential valuation.

HEALTHCARE PRACTICE

Augmented Reality in Medical Education

Assisted a medical education market leader in conducting due diligence on an innovative company providing augmented reality programs for anatomy and physiology instruction; conducted in-depth primary market research to explore the unmet needs, perspective on, and receptivity to, the company's offerings, competitive advantages/disadvantages, likelihood to adopt and price expectations across various market segments including elementary education, middle and high school, college, medical school and continuing education; FSI analyzed the capabilities and positioning of competitors through selected Market Insight Conversations with proprietary contacts; based on findings, estimated market size by segment and potential opportunity for the target company.

HEALTHCARE PRACTICE (cont'd)

Gout

Performed a detailed market assessment for a new urate-lowering therapy utilizing a novel mechanism of action to address unmet needs for gout patients; conducted an extensive review of the clinical literature and potentially competitive products currently in drug development pipelines as well as in-depth interviews with clinicians across multiple specialties; findings focused on sub-populations of gout patients who are not well addressed by current options and who are likely the initial target market for this therapeutic.

ICU Monitoring

Conducted a detailed market analysis of unmet monitoring needs in the ICU; tested receptivity to, and likely adoption of, a novel system for continuous monitoring of glucose, lactate and other analytes; effort included over 80 Market Insight Conversations with physicians and nurses across 7 different ICU subsegments including Burn, Trauma, Medical and Transplant; findings informed the client's late stage development efforts and the commercialization strategy.

Pulmonary Biopsy and Related Practices

Conducted in-depth interviews with pulmonologists complemented by a quantitative survey to understand perspectives on, and practices relative to, EBUS (Endobronchial Ultrasound), EBUS-TBNA (Transbronchial Needle Aspiration), EUS-B (use of EBUS scope in the gastrointestinal tract), and pulmonary injection; study conducted across three countries with findings highlighting similarities and differences in practices across those countries; deliverables focused on defining the strategic growth plan for the client.

Women's Health/Contraception

Investigated physician receptivity through individual interviews complemented by an Internet survey across the US and 5 EU countries to a novel female contraception device, identifying drivers and barriers to adoption; additional research investigated US payor receptivity; deliverables included a market model by country.

HEALTHCARE PRACTICE (cont'd)

Genomics

Assessed the unmet market needs and interest in additional capabilities for the analysis of genomic prevalence data through in-depth interviews with discovery, translational medicine and clinical development leaders in biopharmaceutical companies developing oncology therapeutics; tested receptivity to a web-based tool used to analyze solid tumor genetic alterations from a large patient database; identified use cases for the data and value propositions to be used in market messaging; recommended alternative pricing structures and levels to accommodate needs and interest levels of different market segments.

Post-discharge Cardiac Monitoring

Conducted primary market research with cardiologists to identify common protocols for outpatient cardiac monitoring, focusing on devices that are designed to be used outside of the hospital setting; tested receptivity to a development stage product to monitor Heart Failure patients post-discharge; effort examined the clinical and economic factors required for adoption with a market forecast under relevant scenarios; deliverables included recommended next steps for product development.

European Tender and Reimbursement

Developed an overview of the current processes and incentives/limitations in EU health systems and the reimbursement structure for healthcare products used in hospitals in the UK, Germany, France, Italy and Spain; outlined the EU tender process overall, and detailed the tender process in each of the included countries; estimated the portion of the hospital market subject to tender; for client's product, provided a preliminary analysis of the economic considerations which will be critical for EU hospitals evaluating adoption of this novel hospital-based diagnostic; identified additional funding mechanisms for innovative technologies that could apply for client's product.

HEALTHCARE PRACTICE (cont'd)

Lung Cancer

Investigated unmet market needs in lung cancer therapy and assessed receptivity to a new treatment modality; effort examined the patient journey and treatment options for various stages of lung cancer through interviews with radiation oncologists and other stakeholders; investigated the use of Stereotactic Body Radiation Therapy (SBRT) and potential use of this new treatment modality with, or instead of, SBRT; developed a market model to estimate potential patients for SBRT by stage and current therapy; deliverables included recommendations for product development, patient segment focus, target physician characteristics and other elements of the commercialization strategy.

CORPORATE GROWTH PRACTICE

Supplies Distributor

Provided ongoing project management and analytical support to a medical supplies distributor seeking to unify historically separate sales groups within the organization through a unified and comprehensive compensation program; FSI worked closely with the client in analyzing the current compensation programs, developed options for a unified program including an assessment of the pros and cons of each alternatives, created a roll-out plan, and is providing ongoing support through the roll-out period.

Robotics Component Manufacturer

Conducted a market assessment for a medical device components manufacturer seeking to understand market entry options, opportunities and risks in the surgical robotics industry; conducted primary market research with key stakeholders complemented by secondary market research and analysis to understand market entry options, opportunities and risks; created a market landscape, identified and prioritized the requirements to successfully compete, modeled market size and growth and profiled an initial set of potential acquisition candidates.

FSI PRACTICE GROUPS

High Technology: Internet, software, electronic commerce, communications, networking, hardware, services, *etc.*

Healthcare: Healthcare informatics, devices, healthcare information technology/services, diagnostics, therapeutics, services, *etc.*

Corporate Growth: Mature business transformation, growth options, profit improvement and acquisition support.

FSI STAFF

The professionals of FSI have expertise in both strategy consulting and the industries on which we focus. To facilitate our international assignments, members of our staff are fluent in the major European languages and Chinese (Mandarin).

THE FSI SERVICE OFFERING

- Strategy Consulting
- Growth Initiatives
- Market Research
- Competitive Intelligence/Analysis
- Investment Due Diligence
- Technology Commercialization
- Corporate Partnering

FOR FURTHER INFORMATION

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Focus

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Celebrating  1983-2019

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